B6670-1-U

1988 Report On Television

DRAFT

Nielsen Television Research Services

Nielsen Television Index (NTI) provides continuing estimates of TV viewing and national sponsored network program audiences, including national ratings 52 weeks per year. Data regularly reported include persons audiences and household audiences by market sections, Daily Ratings, Cost/1000 Estimates and Program and Brand Cumulative Audiences. In addition, the National Audience Demographics Report provides estimates of audiences by persons categories within household demographics. NTI's on-line multiphase time sharing computer systems offer clients direct access to a wide range of special analyses.

Nielsen Station Index (NSI) measures television station audiences in over 200 local markets, and provides season-to-season reports (up to seven per market per year) on viewing by time periods and programs. NSI measurements include metro area and Designated Market Area (DMA) ratings, station total audiences, program preemptions, cumulative audiences and estimates of viewing over a wide range of demographic categories.

Nielsen Metered Market Service provides daily and weekly reports on television audiences in New York, Los Angeles, Chicago, San Francisco-Oakland, Philadelphia, Detroit, Washington, D.C., Boston, Dallas-Ft. Worth, Houston, Miami-Ft. Lauderdale, Denver, Atlanta, Seattle-Tacoma, Hartford & New Haven, Sacramento-Stockton (May 1988), and Minneapolis-St. Paul (October 1988).

Nielsen Homevideo Index (NHI) provides measurement services for the cable television industry and related in-home video forms. This includes audience measurements for the cable satellite networks, local cable systems, pay-TV services and program suppliers.

Nielsen Syndication Service (NSS) combines data on syndication from all three Nielsen Media Research services (NTI, NSI and NHI), providing one source for existing syndication data, reports and services, and offering new products for those in the program syndication business.

Additional copies of this brochure are available at no charge upon request to Nielsen Media Research, Nielsen Plaza, Northbrook, Illinois 60062, U.S.A.

The Nielsen data in this booklet are estimates of the audiences and other characteristics of television usage as derived from Nielsen Television Index, Nielsen Station Index and Nielsen Homevideo Index measurements. The use of mathematical terms herein should not be regarded as a representation by Nielsen that such measurements are exact to precise mathematical values.

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1988 Report On Television

Nielsen

The 1987-88 TV season marked the beginning of a new era in television audience research. Now what people watch on TV can be measured by the Nielsen People Meter with greater speed and accuracy than ever before.

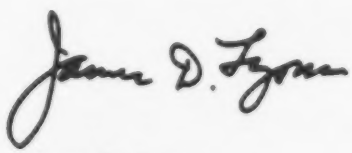
This much heralded change was not an overnight happening, but instead was the cumulation of years of development, refinement and testing. What has become an overnight reality is the daily electronic delivery of people ratings to clients. Of utmost importance has been the counsel and guidance provided to us by our national clients including broadcast and cable networks, advertisers, agencies, and syndicators during the transition to people meters.

As for local television services, we will be metering Sacramento-Stockton and Minneapolis-St. Paul in 1988. This will bring our total to 17 metered markets, in addition to all markets in the country measured by our TV diary service.

We've also made significant improvements in the services we provide to the cable industry and program syndicators. This includes people meter based ratings and a program lineup data gathering system.

Our commitment to all our clients in broadcasting, cable, advertising and syndication is to provide the best possible research. As we define it, **Information with Integrity.**

The 1988 Nielsen Report on Television is our 33rd annual review of the electronic media. I believe you will find it as informative as those we have produced previously.



James D. Lyons
President
Nielsen Media Research

Viewing Choices Expanding

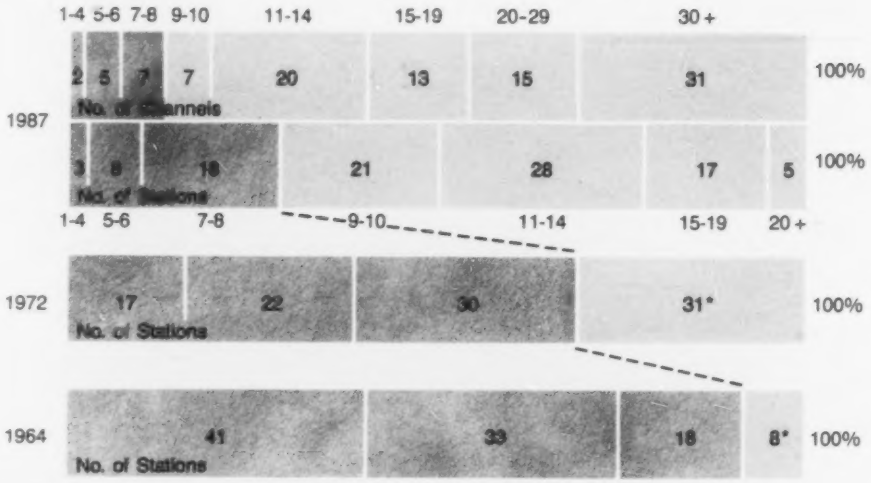
Nielsen Television Index reports as of September 1987 that 71% of U.S. TV households can receive nine or more TV stations. As a comparison, only 8% could receive that many stations in 1964.

When cable channels are included with the over-the-air station signals, 86% can receive nine or more channels and 31% can receive 30+ channels.

The Federal Communications Commission reports there are 1,342 TV stations on the air as of January 1, 1988. This includes 1,017 commercial and 325 public/educational stations. Not included in this total are an additional 272 low powered television stations (LPTV). Nielsen Homevideo Index reports there are 10,172 cable systems operating in the U.S.

Stations and Channels Receivable Per TV Household

% Share of TV Households

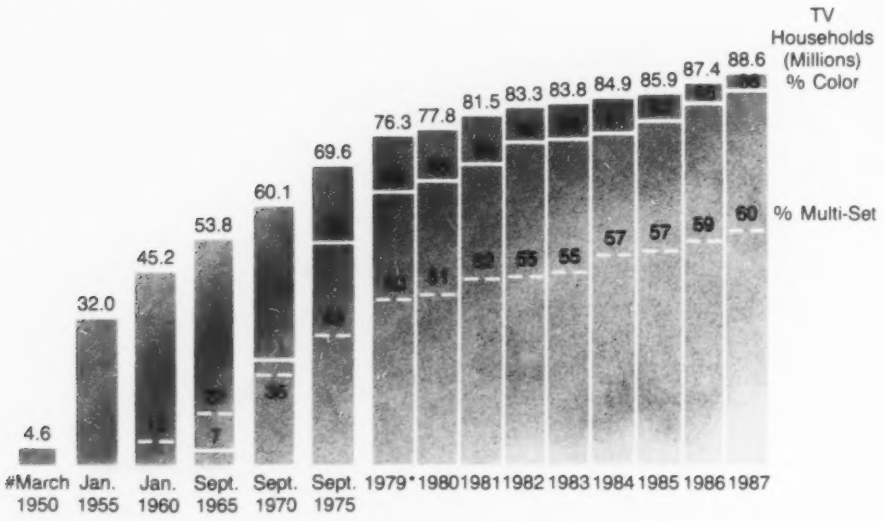


Source: NTI Sample July 1964 and 1972, September 1987
* 9+ Stations

TV Households Increasing

Nielsen estimates that 88.6 million U.S. households own at least one TV set (as of January 1988). 96% of these households have color TV and 66% have two or more sets.

TV Ownership



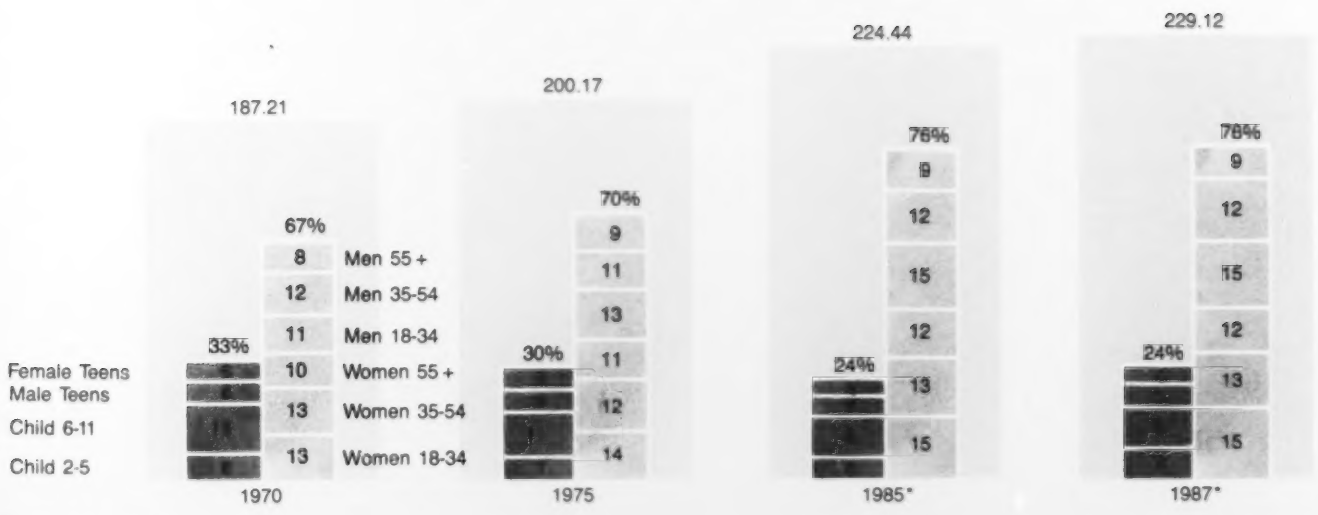
 # TV Ownership U.S. Census 1950-'70; Nielsen Estimates 1975-'87
Color: ARF Census 1965; Nielsen Estimates 1970-'87
Multi-Set: U.S. Census 1960-'65; Nielsen Estimates 1970-'87

** As of 1979, estimates based on Jan. 1 of following year, effective in September (excluding Alaska and Hawaii)*

Total Persons In TV Households Increasing

The total number of persons in TV households has grown 22% since 1970, but the adult share has risen nine points to 76% while the share of non-adults (particularly children) has declined to 24%. This disparity, however, has not increased in more recent years.

Total Persons in TV Households (Millions)



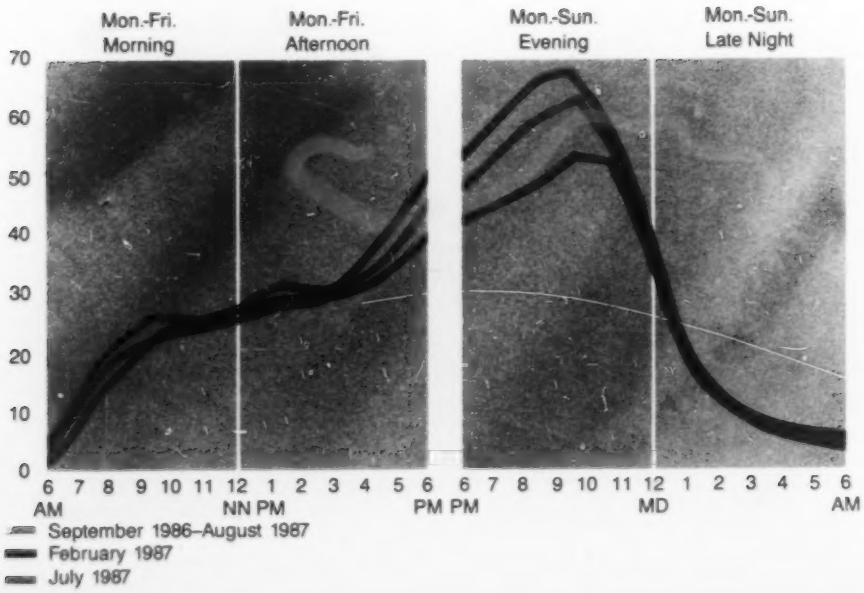
** Based on Jan. 1 of the following year. Others based on Sept. 1 of each year.*

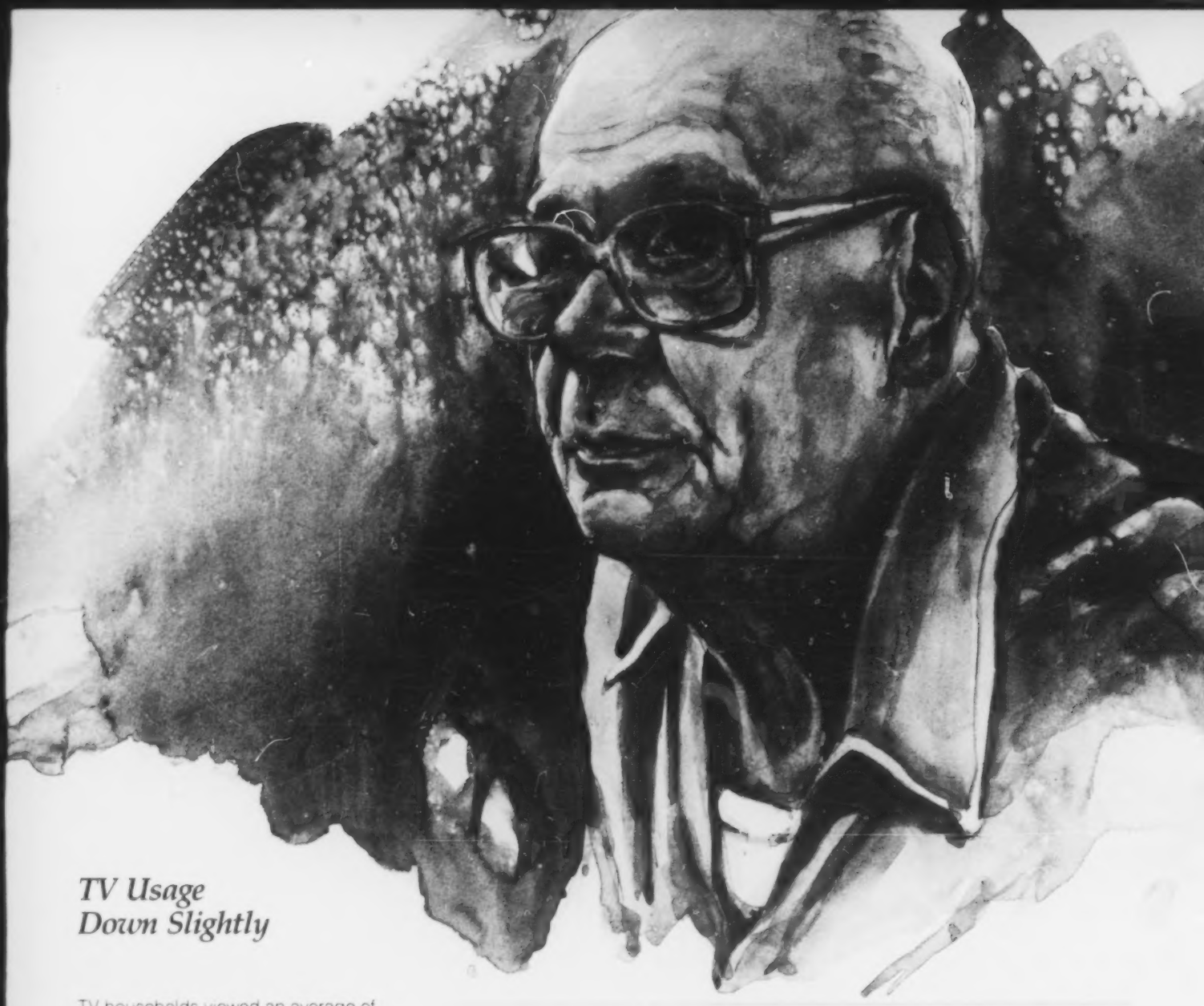
Viewing Peaks In Mid-Evening

Television viewing increases throughout the day, reaching a peak between 8 and 10PM, then declines as people retire for the night.

TV usage can vary considerably from Winter to Summer. The greatest differences are during late afternoon and early evening while the smallest seasonal differences occur in early morning and late night.

Percent of Households Using Television

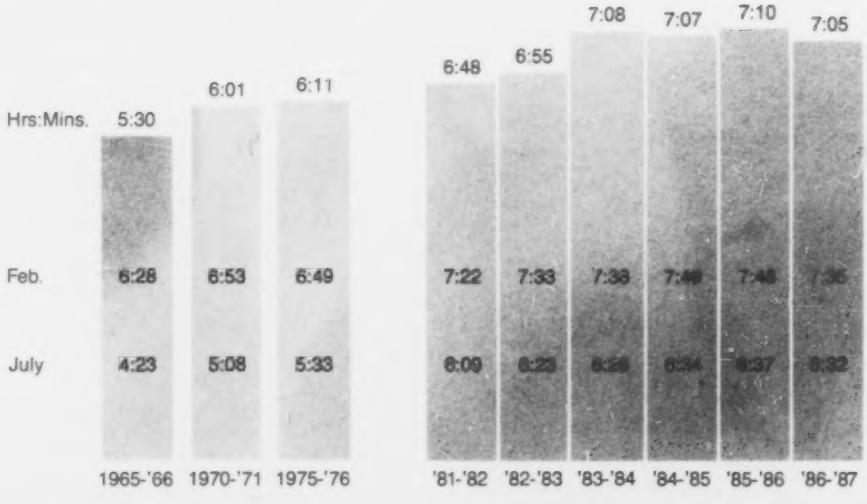




TV Usage Down Slightly

TV households viewed an average of seven hours and five minutes a day during the September 1986–August 1987 TV season. Also shown at the right are the TV usage figures for February and July (representing high and low seasonal viewing periods respectively).

Average Hours of Household TV Usage Per Day



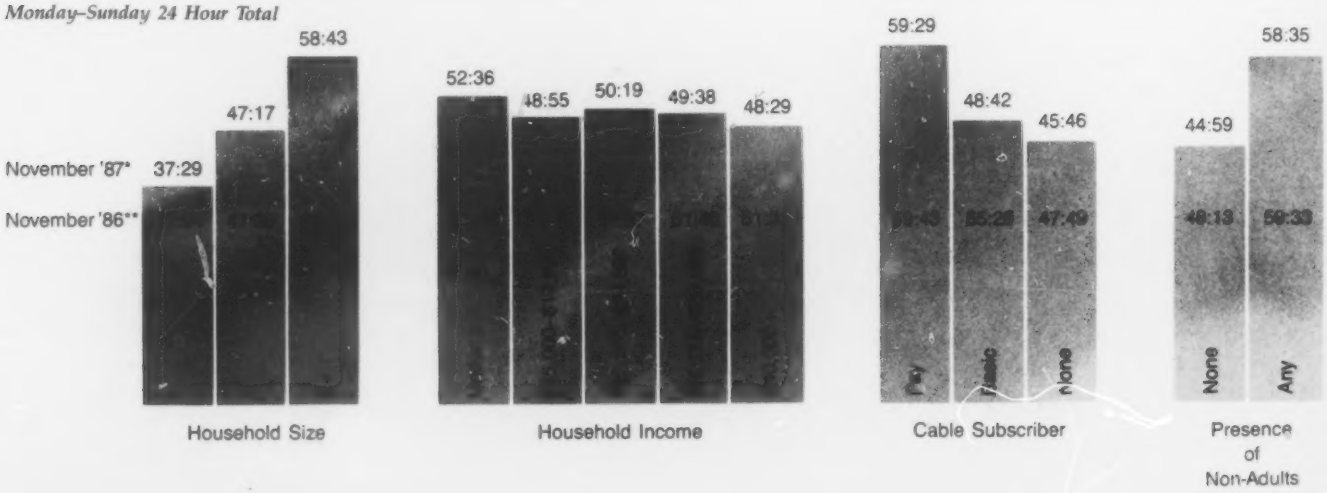
Nielsen estimates based on total U.S. Households Sept.–Aug. 48-week average excluding unusual days.

Viewing Varies By Household Characteristics

Viewing levels in TV households vary according to the characteristics of those households. For example, in November 1987 those that viewed the most were: households having three or more people, pay cable households and households with non-adults. Even the lowest viewing group, single person households, had their sets on 37½ hours a week, as much time as many people spend at their jobs.

Hours of TV Usage Per Week by Household Characteristics

Monday–Sunday 24 Hour Total



** Nov. '86–based upon 3 weeks of NAC Diary data*

* Nov. '87–based upon Nielsen People Meter data*

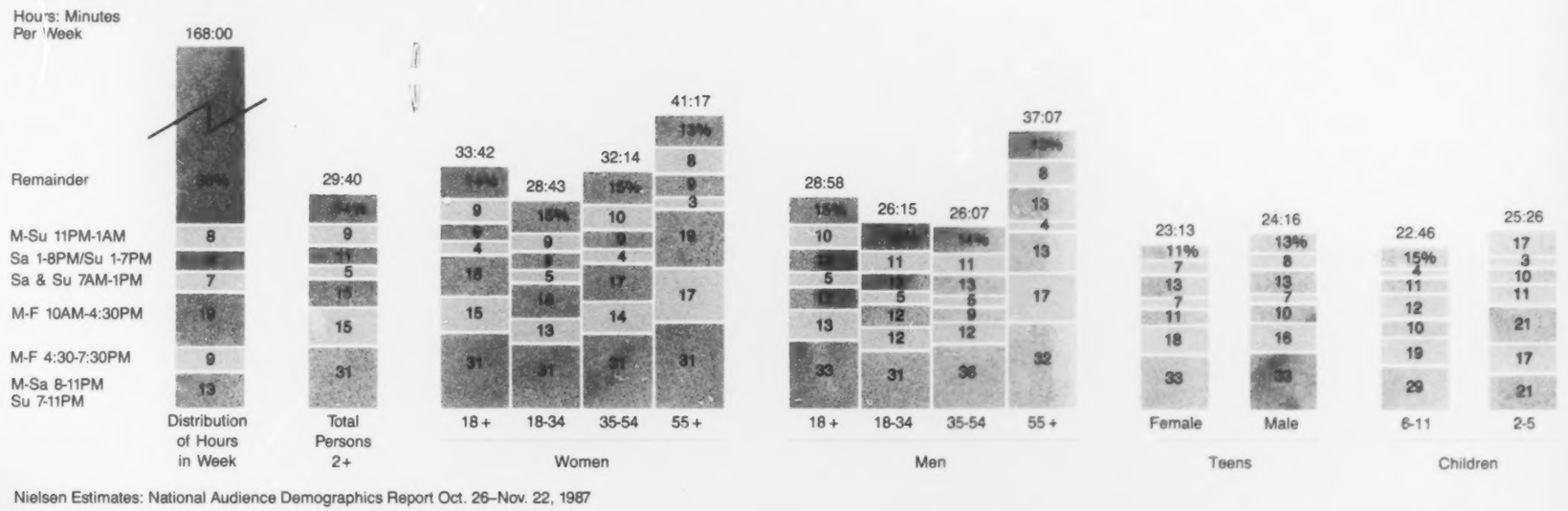
How People Do Their Weekly TV Viewing

In general, women view more television than men; older adults view more than younger men and women; and younger children view more than older children and teenagers.

All but one of the demographic groups spend the greatest share of their time viewing television during primetime hours. The one exception is children 2-5, who spend an equal amount of time watching primetime and weekday daytime TV.

Weekly Viewing Activity for Women, Men, Teens and Children

November 1987 (Figures in Bars are Shares)



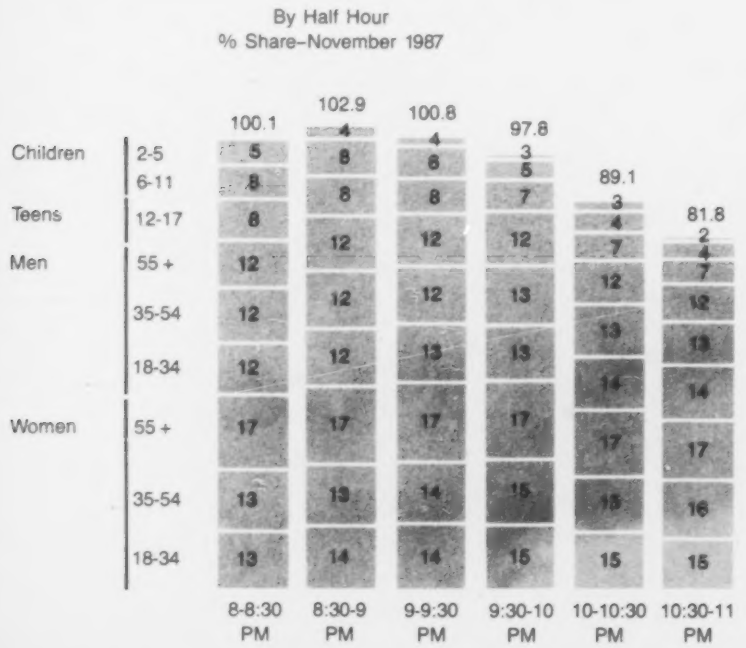
Nielsen Estimates: National Audience Demographics Report Oct. 26–Nov. 22, 1987

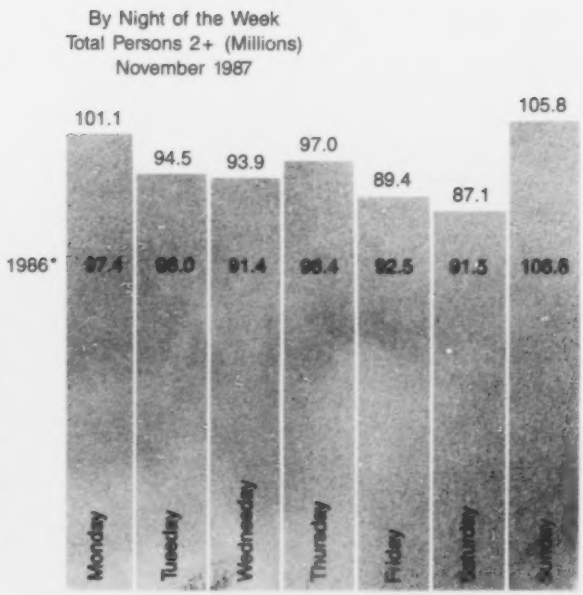
8:30-9:00PM And Sundays Lead Again

8:30 to 9PM continues to be the most viewed half-hour primetime period. Women account for the greatest share of viewing during all of these half-hours.

Sunday evening, as in previous years, is the most popular night for viewing television.

Persons Viewing Primetime (Average Minute)





* *Nov. '86 NTI/NAC Sample*
8-11PM Eastern Time except Sunday 7-11PM.
Excludes unusual days.

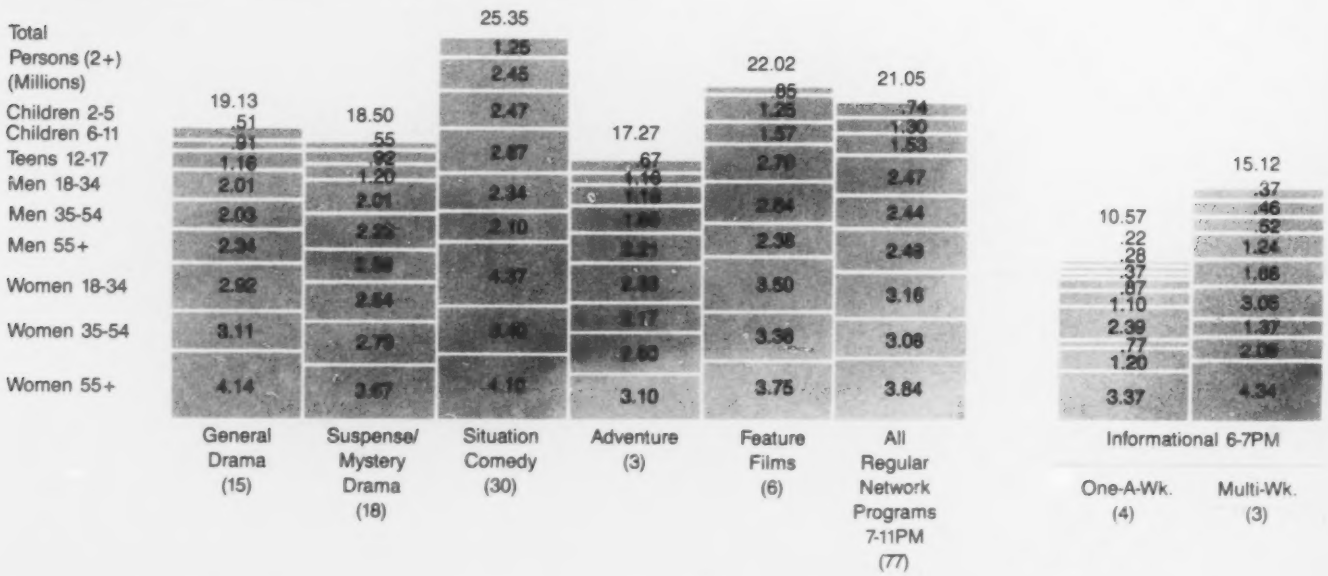
Situation Comedies Most Viewed Program Type

Situation Comedy programming attracted the largest primetime audiences in November 1987. Feature Films ranked second, followed by General Drama.

Women 18-34 made up the greatest segment of the audience for Situation Comedies. Women 55+ had the greatest share of audience for all General Drama, Suspense/Mystery Drama, Adventure and Feature Films.

Audience Composition by Selected Program Type

Regularly Scheduled Network Programs 7-11PM (Average Minute Audiences)



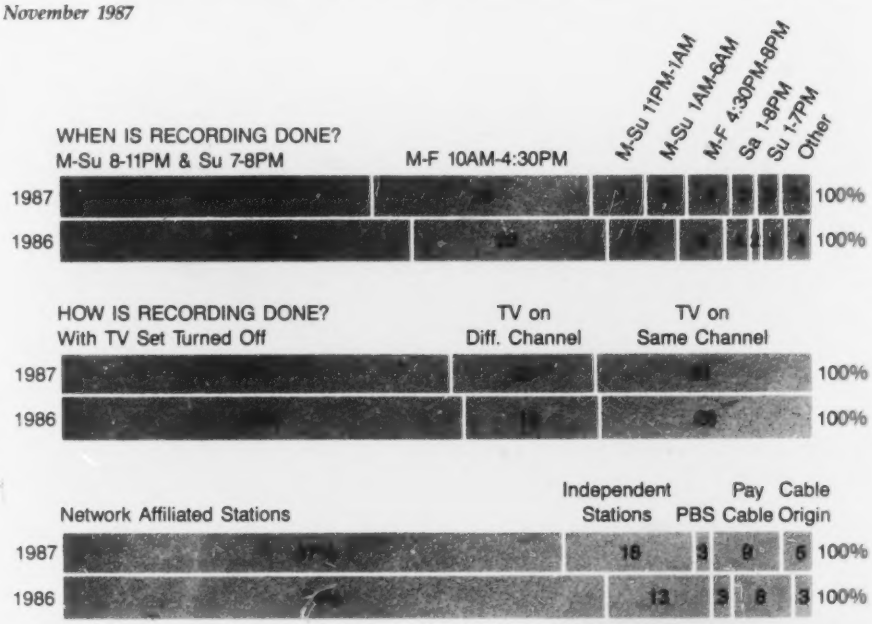
( ) No. of Programs–November 1987

VCR Usage Widespread

Video cassette recorder ownership is now over the 50% mark. Recent measurements in the Nielsen Television Index sample have shown most recording during primetime (41%) and weekday daytime (29%). Most recordings are made with the television set turned off, and 67% of all the recordings are of programs telecast by network affiliated stations.

Video Cassette Recorder Activity in VCR Homes

November 1987



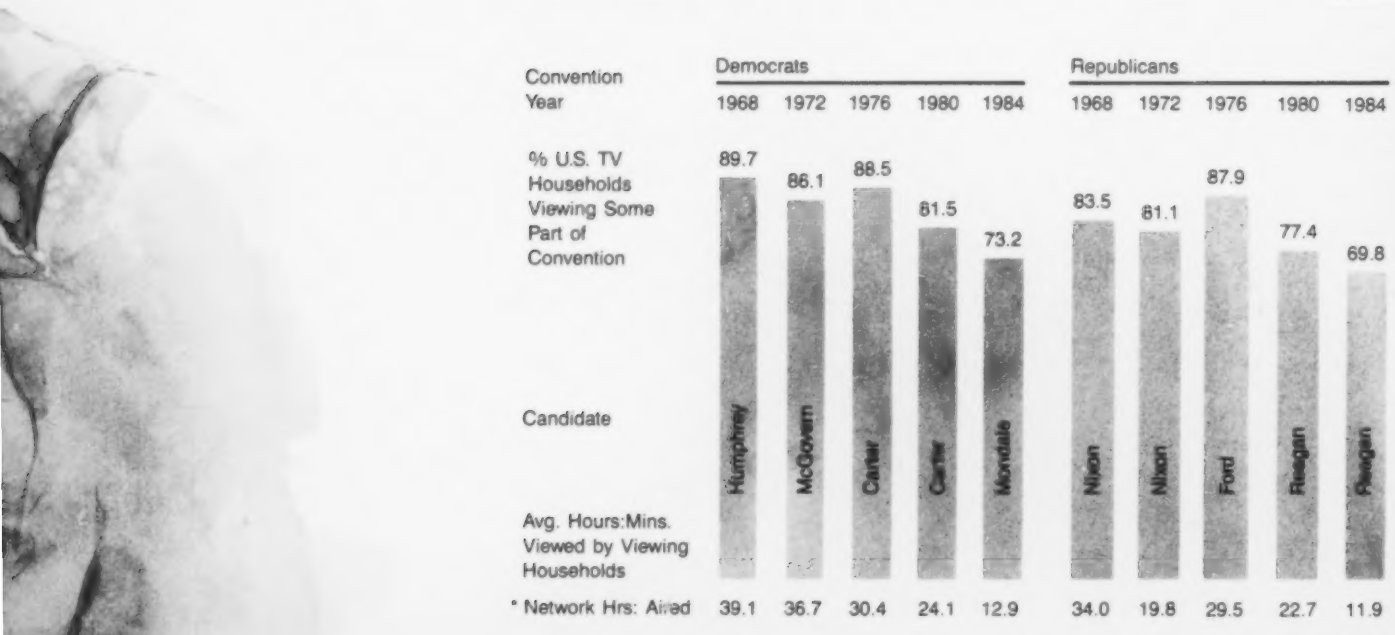
The 1988 Political Year

1988 is another presidential election year, and that is giving television viewers a steady diet of political speeches, conventions, and election returns.

On the average, 82% of U.S. TV Households are typically exposed to one of the quadrennial political conventions.

The number of hours of network coverage of the conventions has been declining since 1968. Viewing time has also decreased from a combined 17 hours and 21 minutes in 1968 to 6 hours and 6 minutes in 1984.

Convention Audiences



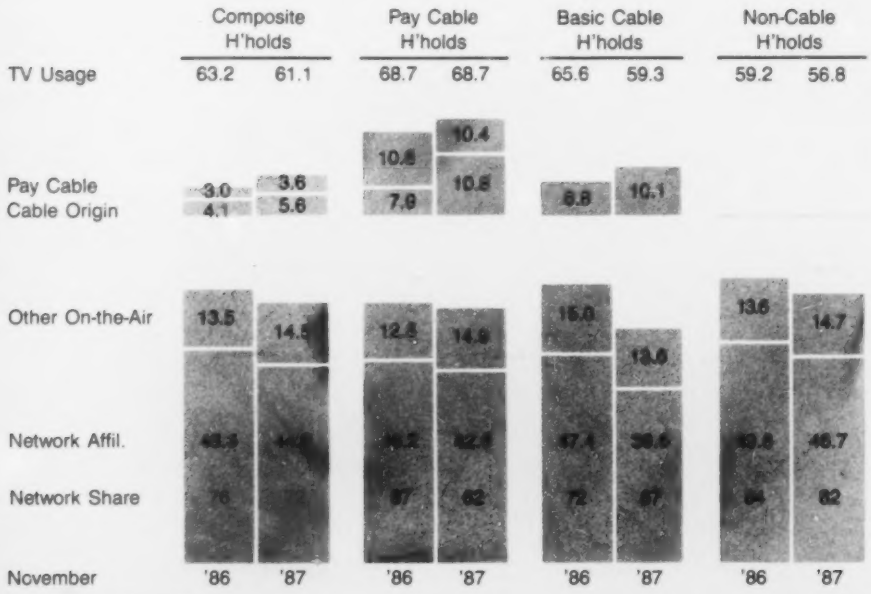
* *One or more networks telecasting*

Cable TV Households Do More Viewing

In general, households subscribing to pay cable services view more television than non-cable or basic cable households.

In primetime, the largest share of viewing in pay cable households (62) is to network programming. Pay cable offerings have a 10.4 rating or 15 share and non-pay cable originated programming has a 10.8 rating or a 16 share.

Source of Household Viewing—Primetime (Mon.-Sun. 8-11PM)


Composite H'holds
Pay Cable H'holds
Basic Cable H'holds
Non-Cable H'holds
TV Usage
63.2 61.1 68.7 68.7 65.6 59.3 59.2 56.8
Pay Cable
Cable Origin
3.0 4.1 3.6 5.6 10.8 7.8 10.4 10.8 6.8 10.1
Other On-the-Air
Network Affil.
Network Share
13.5 14.5 12.8 14.9 15.0 13.6 13.6 14.7
76 72 67 62 72 67 64 62
November
'86 '87 '86 '87 '86 '87 '86 '87

Nielsen Cable Status Report

Top 20 Syndicated Programs

There are over 500 syndicated programs scheduled at various times on both network affiliated and independent stations. Many of these programs are on network TV at one time, while others were made exclusively for local scheduling.

This list shows the top 20 programs in November 1987 ranked by their average household rating within the area in which they could be viewed. Wide variances can be seen in the number of markets in which they were telecast and the % of U.S. TV Households which could view these programs (% coverage).

Consequently, the coverage of a syndicated program must be considered, as well as its rating, when gauging the overall impact on a total U.S. basis.

Top Ranking Syndicated Programs

November 1987

Rank		# of Mkts.	Rating*	Share	% U.S. Coverage
1	Wheel of Fortune	190	19.0		
2	PM Magazine	26	12.3		
3	Jeopardy	159			
4	Oprah Winfrey Show	190	10.5	31	98.8
5	Big Spin	8	9.9	18	10.6
6	Family Ties	172	8.0	15	94.0
7	Peoples Court				
8	M.A.S.H.				
9	Donahue				
10	Win Lose or Draw	128	7.0	18	74.9
11	So. West Conf. Ftbl.	20	6.9	23	7.5
12	Cheers	144	6.8	15	85.0
13					
14	Hollywood Squares				
15	Three's Company	122	6.3	14	77.9
17	A-Team	26	6.0	13	25.0
17	Hee Haw	159	6.0	15	79.8
	Facts of Life	113	5.9	13	61.1

* Ratings based on Designated Market Area coverage as reported by Nielsen's Cassandra Service

Top Ten By Markets

The top ten nationally ranked prime evening network programs in November 1987 also showed up in one or more of the markets where Nielsen has metered measurements of local TV audiences. Each market, however, had its own distinctive list. Some markets included one or more programs not found on either the national or other major market lists.

Top Ten Network Programs

Based on November 1987 4-Week Average
As Computed by Nielsen Station Index

	Bill Cosby Show	A Different World	Cheers	Night Court	60 Minutes	Growing Pains	Who's the Boss?	Murder, She Wrote	Special Movie-Pnnt-Mon (CBS)	Golden Girls	L.A. Law	Mov-Week-Tue (NBC)	Mon Nite Fbl	Moonlighting	Bev Hills Buntz	Family Ties	Alf	My Two Dads	Cowboys Football (NBC) (S)	Head of the Class	Newhart	Dolphins Football (S) (ABC)	Napoln & Josephine Part I	Matlock	
U.S.*		2		4		6		8		10															Rank
		28.5		25.3		23.1		22.0		21.5															A/A%
New York		3		4		8		5		10	7														Rank
		28.1		27.7		24.9		25.8		24.1	25.0														Rtg.
Los Angeles		2		8		9		6		4		10													Rank
		26.4		22.3		21.8		22.8		23.6		21.3													Rtg.
Chicago		4		5		7					9		3	8	10										Rank
		29.3		29.2		28.7					25.7		29.8	26.3	25.4										Rtg.
Philadelphia		2		9		5		10		6															Rank
		31.6		24.4		28.8		24.0		28.2															Rtg.
San Francisco/ Oakland		3		7		10		5		8						10									Rank
		25.3		22.4		19.8		22.5		20.7						19.8									Rtg.
Boston		2		4		8		5		7	10														Rank
		28.5		25.8		21.2		25.3		21.4	20.2														Rtg.
Detroit		2		5		9			7						4		6	10							Rank
		36.2		30.3		27.0			26.4						31.4		29.6	26.5							Rtg.
Dallas/Ft. Worth		3		9		8		7		9									1						Rank
		28.3		21.5		22.1		22.5		21.5									35.4						Rtg.
Washington, D.C.		4		7		8		5		8			6												Rank
		25.9		24.4		23.4		25.8		23.4			24.8												Rtg.
Houston		2		6		3								7			6			10					Rank
		29.0		25.5		27.3								23.2			22.5			20.7					Rtg.
Atlanta		2		10		3				6				8			7								Rank
		31.3		23.1		25.6				24.5				23.9			24.7								Rtg.
Seattle/Tacoma		2		4		10		5						9		8									Rank
		28.8		25.0		20.8		24.3						22.0		22.3									Rtg.
Miami/ Ft. Lauderdale		5		8				7		4											2		10		Rank
		22.8		21.8				22.2		23.9											26.4	21.0	20.6		Rtg.
Denver		3		6		10								7		7									Rank
		28.1		26.7		22.2								23.7		23.7									Rtg.
Hartford and New Haven		7		8		4		3						10						9					Rank
		21.7		21.2		24.5		24.8						20.0						20.9					Rtg.

* *Nielsen Television Index Average Audience ratings for matching Nielsen Station Index dates of October 29-November 25, 1987.*

Top 15 Network Programs

Many different programs rank in network television's top 15 in the course of a year. Those shown here were the regular network programs that ranked at the top during Nielsen Television Index measurements, in November 1987.

The size of a program's audience is but one of the number of ways to assess its worth or success. For example, many programs below the top 15 may be considered successful because they appeal to a specific target audience that network advertisers want to reach.

Top 15 Regularly Scheduled Network Programs

TOTAL U.S. TV HOUSEHOLDS	AA%
1. Bill Cosby Show	32.3
2. A Different World	28.5
3. Cheers	26.4
4. Night Court	25.3
5. Growing Pains	24.3
6. 60 Minutes	23.1
7. Who's The Boss?	22.8
8. Murder, She Wrote	22.0
9. Golden Girls	21.5
10. L.A. Law	20.0
11. CBS Sunday Movie	19.6
12. Moonlighting	19.5
13. Family Ties	18.9
14. Alf	18.8
15. NFL Monday Night Football	17.7

MEN 18+	AA%
1. 60 Minutes	17.6
2. Bill Cosby Show	17.3
3. NFL Monday Night Football	16.4
4. Cheers	14.9
5. Night Court	14.6
6. A Different World	14.4
7. Murder, She Wrote	13.9
8. CBS NFL Football Game 1	13.8
9. L.A. Law	13.4
10. CBS Sunday Movie	12.8
11. CBS NFL Football Game 2	12.6
12. NFL Game 2	12.4
13. CBS College Football Game 2	12.2
14. Growing Pains	12.1
15. Family Ties	11.9

CHILDREN 2-11	AA%
1. Bill Cosby Show	22.5
2. A Different World	20.9
2. Alf	20.9
4. Growing Pains	19.2
5. Who's The Boss?	17.6
6. Valerie's Family	17.5
7. Disney Sunday Movie	16.8
8. Family Ties	15.5
9. Pee Wee's Playhouse	14.4
10. My Two Dads	13.9
11. Muppet Babies III	12.3
12. Cheers	12.2
13. Muppet Babies II	11.8
14. Perfect Strangers	11.6
14. Alvin & The Chipmunks	11.6

WOMEN 18+	AA%
1. Bill Cosby Show	26.8
2. A Different World	23.0
3. Cheers	20.8
4. Night Court	19.4
5. Murder, She Wrote	19.1
6. Golden Girls	18.7
7. Growing Pains	18.0
8. Who's The Boss?	17.0
9. CBS Sunday Movie	16.7
10. 60 Minutes	16.3
11. Dallas	15.7
12. L.A. Law	15.6
13. Amen	14.9
14. Matlock	14.8
15. NBC Monday Night Movies	14.5

TEENS 12-17	AA%
1. Growing Pains	25.1
2. Bill Cosby Show	22.9
3. A Different World	22.6
4. Who's The Boss?	21.4
5. Alf	21.2
6. Valerie's Family	19.7
6. Family Ties	19.7
8. My Two Dads	18.2
9. Cheers	17.7
10. Moonlighting	16.9
11. Night Court	16.3
12. Head of The Class	15.9
13. Perfect Strangers	14.0
14. Golden Girls	12.8
15. Facts of Life	12.7

Nielsen Average Audience Estimates
2 or more telecasts (15 minutes or longer)
November 1987

Nielsen Media Research

a company of
The Dun & Bradstreet Corporation

NORTHBROOK
Nielsen Plaza
Northbrook, IL 60062
312/498-6300

NEW YORK
1290 Avenue of the Americas
New York, NY 10104
212/708-7500

ATLANTA
1200 Ashwood Parkway
Suite 135
Atlanta, GA 30346
404/393-1010

CHICAGO
410 N. Michigan Avenue
Chicago, IL 60611
312/828-1170

DALLAS
333 W. Campbell Road
Richardson, TX 75080
214/669-1700

SAN FRANCISCO
423 Washington Street
San Francisco, CA 94111
415/397-7774

MENLO PARK
70 Willow Road
Menlo Park, CA 94025
415/321-7700

LOS ANGELES
6255 Sunset Blvd.
Los Angeles, CA 90028
213/466-4391

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